



Senior Tax Preparer

Position Purpose:

Joining a well-established and growing practice, the Senior Tax Preparer will deliver high-quality tax services and manage relationships with an existing client base. This role will also support junior staff while ensuring accuracy, compliance, and client satisfaction across all tax-related engagements. Additionally, this role may also include some accounting or other business responsibilities as time and training allows.

Tax Preparation Duties and Expectations

- Tax Preparation: Prepares complex tax returns for individuals / businesses, S-Corps, partnerships, trusts and estates.
- Review Work: Reviews returns prepared by junior staff to ensure accuracy, compliance, and optimization.
- Client Management: Meets with clients, gathers financial information, explains tax implications, and provides tax planning guidance.
- Research & Strategy: Stays current on new tax law changes, identifies deductions /credits, and advises clients on strategies.
- Mentorship: Assists in training junior preparers or seasonal staff, often reviewing and coaching their work.
- Problem Solving: Handles IRS or state notices, resolves discrepancies, and communicates with taxing authorities.

Qualifications

- 5+ years of tax preparation experience.
- Enrolled Agent or CPA credentials preferred.

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